

VAE step-by- step guide

Your quick-start guide to Veeva
Approved Emails and BEE Editor



Use the Arrows to navigate
through sections of this document



Click the 'home' icon to return
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HTML emails vs BEE emails

HTML pros

- Industry standard
- More flexible on creative design than BEE
- More scope for graphics, layout and interactivity
- Ability to develop fragments to tailor emails
- HTML can be adapted if moved away from Veeva in the future
– BEE emails would require redeveloping

HTML cons

- Requires programming and coding skills, therefore, agency support is required

BEE pros

- Open to all content creators, no programming or HTML skills needed
- Rapid creation and deployment
- Reduced reliance on agencies
- Create email templates that can embed fragments (fragments must be built in HTML)

BEE cons

- Not as flexible as HTML
- Limited features vs HTML, therefore additional graphics, visuals or page layouts may not be supported by BEE
- BEE can be used to create email templates but not fragments



How to upload a VAE to Veeva PromoMats

VAE functionality uses reusable HTML content, created by digital agencies, to compose approved emails.

What you'll receive from the agency

One zip folder containing a HTML file and a folder containing image assets for the email.



Please do not amend or change any of the file names provided by your agency as this will impact links within the HTML code.



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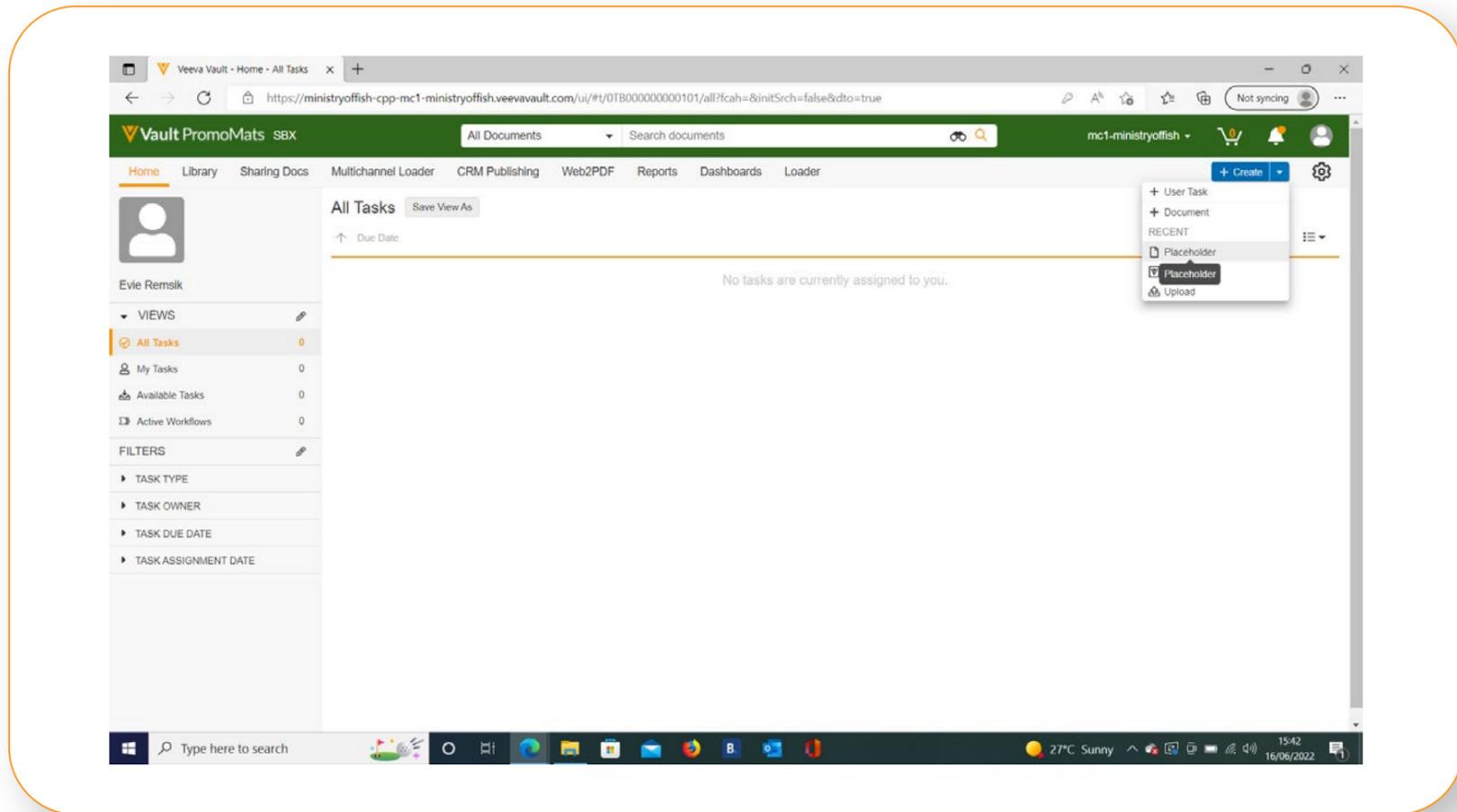
Step 1 Making your placeholder

Unzip the file – right click and choose **'Extract All'**. Save this copy where you wish to access it.

The unzipped folder will contain two files: The HTML file, identifiable by the **'.html'** extension, and a second .zip folder titled **'Images'**. Other agencies may label these files differently, look for the relevant file name extension and a folder containing the appropriate emailer images.

Step 2 Set up the email template

In Veeva PromoMats, click on **'Create'** and select **'Placeholder'**. To choose a document type, search for **'Email Template'** in the yellow search bar, select and click **'Next'**.



Step 3 Writing your metadata

Fill out the meta data as required.

You will need to complete all the fields that are highlighted yellow in order to save the placeholder.

Once completed click **'Save'**.

Tips:

- For **Email Template Type**, choose **Standard Template**. All promotional emails use this type.
- The **Content Type** is part of the consent check that is made in Veeva. Select this according to product type.
- **Consent Check** will always be defaulted to **Yes**. Please do not change from the default.
- **Subject** is the subject line of the email and should not be promotional (i.e. make claims or have both the brand and indication together) as it can be viewed without opening the email and PI / references wouldn't be included.
- If a brand name is mentioned, any obligatory information (generic name, black triangle etc.) must be included

These tokens personalise the email and allow the HCP to respond to the rep directly.

From address {{User.OT_Approved_Email_Subdomain__c}}

From name {{userName}}

Reply to address {{userEmailAddress}}

Reply to name {{userName}}





The screenshot displays the Veeva Vault PromoMats SBX interface. The top navigation bar includes the logo, a dropdown menu for 'Library (All Documents)', a search bar, and user information for 'mc1-ministryoffish'. Below the navigation bar, a horizontal menu lists various application features: Home, Library, Sharing Docs, Multichannel Loader, CRM Publishing, Web2PDF, Reports, Dashboards, and Loader. On the right side of this menu are '+ Create' and a settings gear icon.

The main content area is divided into two sections. The left section is currently empty. The right section, titled 'Product Information*', contains a 'Product' dropdown menu with 'Cholecap' selected. Below this is the 'Email Fields*' section, which includes several input fields with placeholder text: 'From Address*' (containing a complex merge tag), 'From Name' (containing '{{userName}}'), 'Reply To Address' (containing '{{UserEmailAddress}}'), 'Reply To Name' (containing '{{UserName}}'), 'Subject*' (empty), and 'Email Domain' (empty). At the bottom of the right section, there are three expandable options: 'Embedded Viewer', 'External Viewer', and 'Events Management Prop...'. The interface uses a clean, professional design with a light green header and a white main area.



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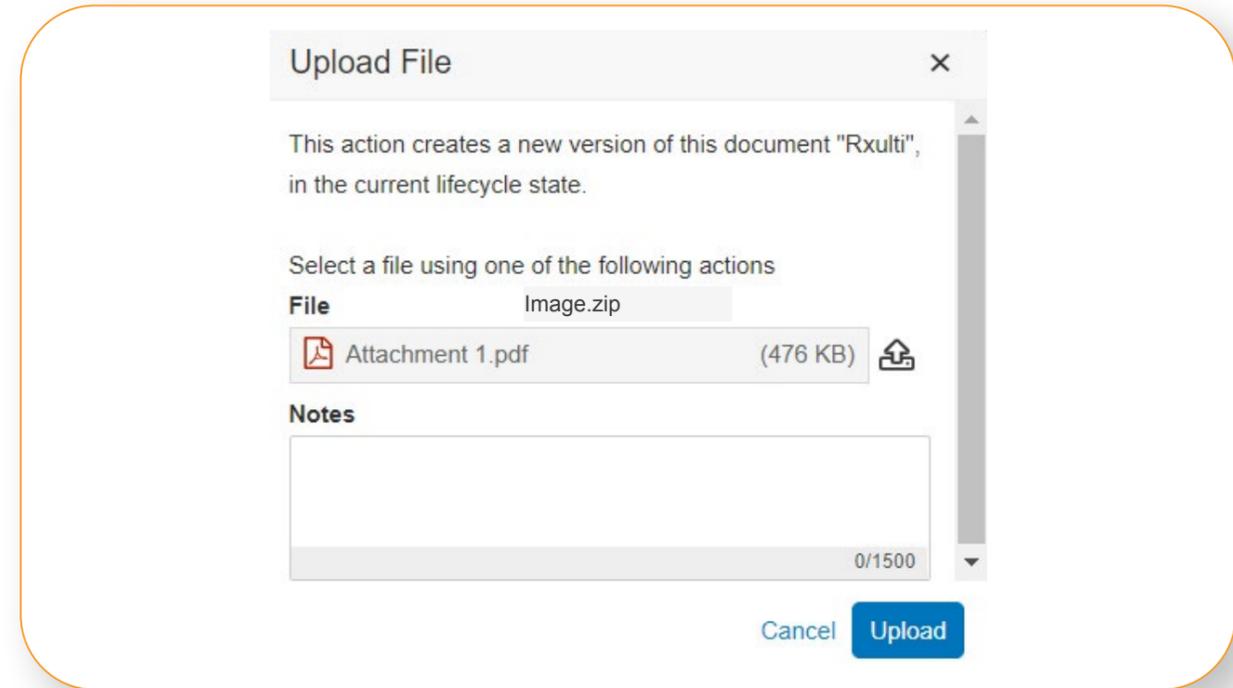
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Step 4 Upload the index (HTML document)

Click **'Upload File'**, then choose and select the folder that you previously unzipped. Select the file named **'*.html file*'** and click **'Open'** to upload.

Once uploaded you will see the email template displayed, however the images will be missing.

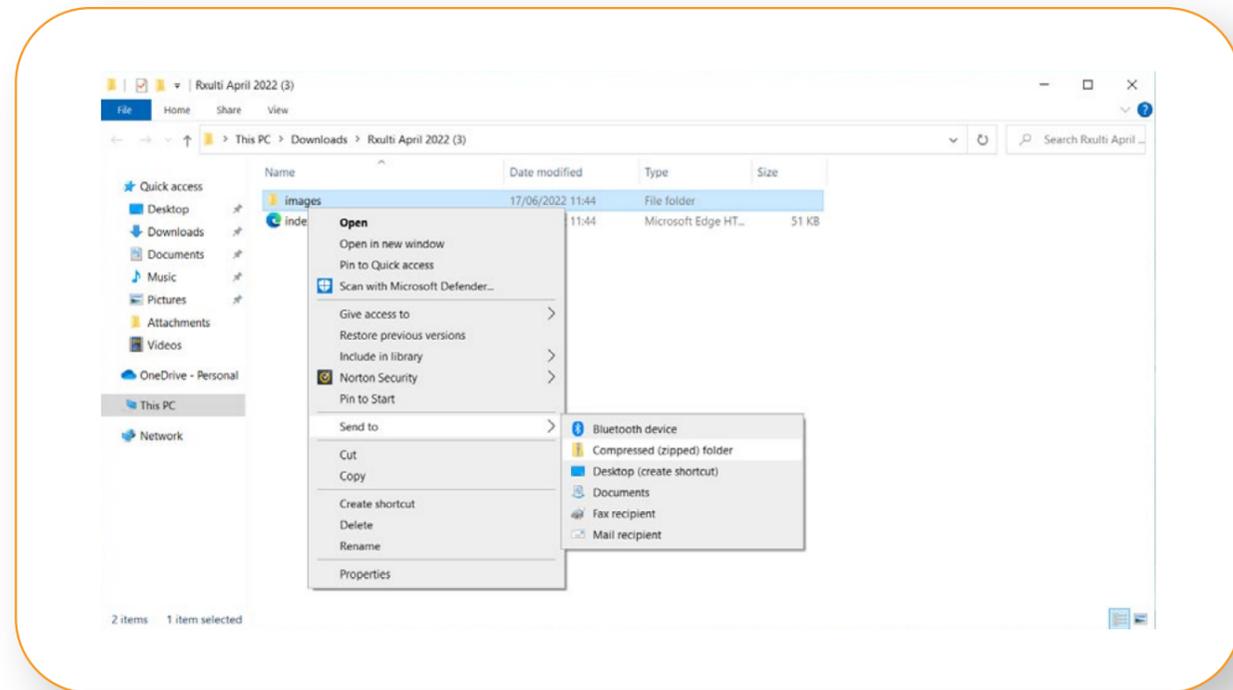


Step 5 Upload the image .zip

To upload the image folder, it must be zipped. To do this, go to your unzipped image folder and right click. Select **'Send To'** and click on **'Compressed (zipped)'**.

Tip: Once uploaded you may need to leave the email template or refresh the page for PromoMats to generate a viewable rendition with the images included.

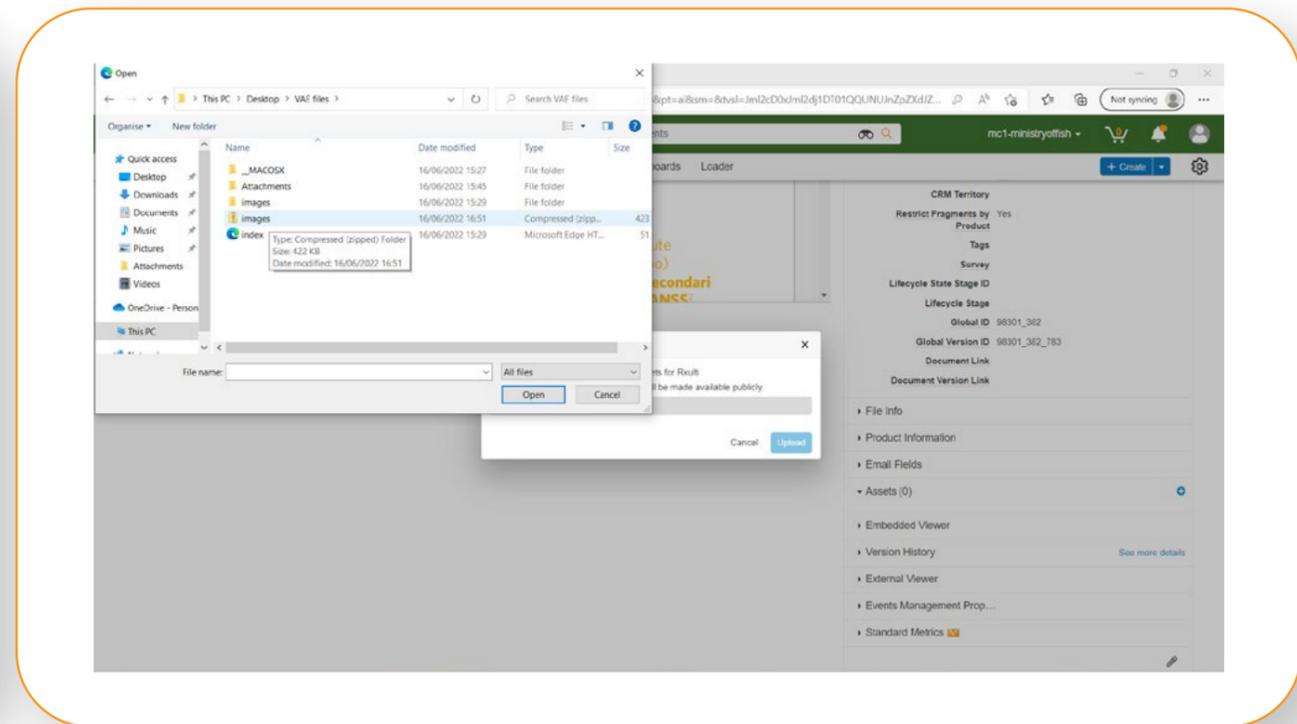
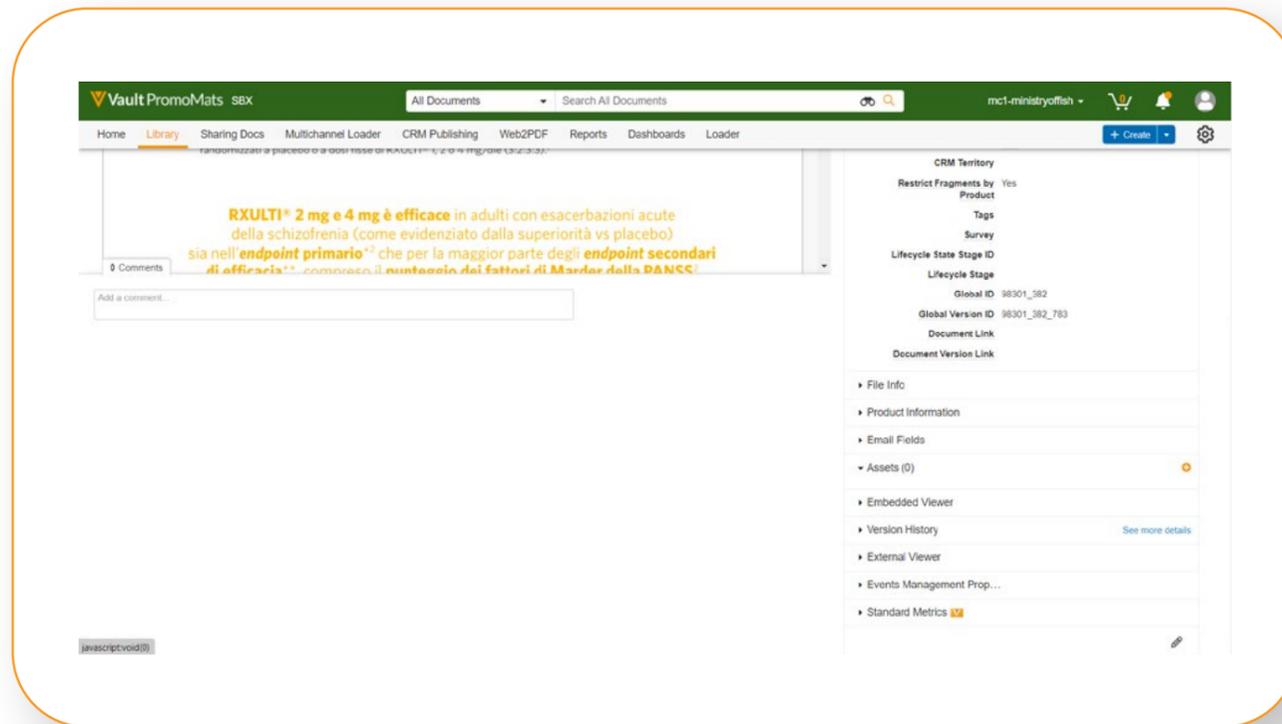
If you are still having trouble rendering your email please reach out to your system admin or raise a Solvelt ticket



Step 5 Upload the image.zip file (cont.)

Go back to PromoMats and scroll down the information section on the righthand side to the field labelled **'Assets'**.

Click on the small plus symbol and choose your zipped image file, **'Open'** and **'Upload'**.



Step 6 How to create links to documents

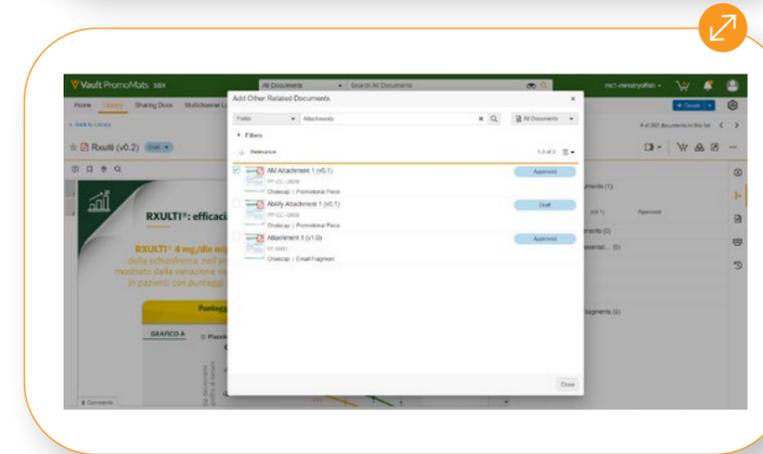
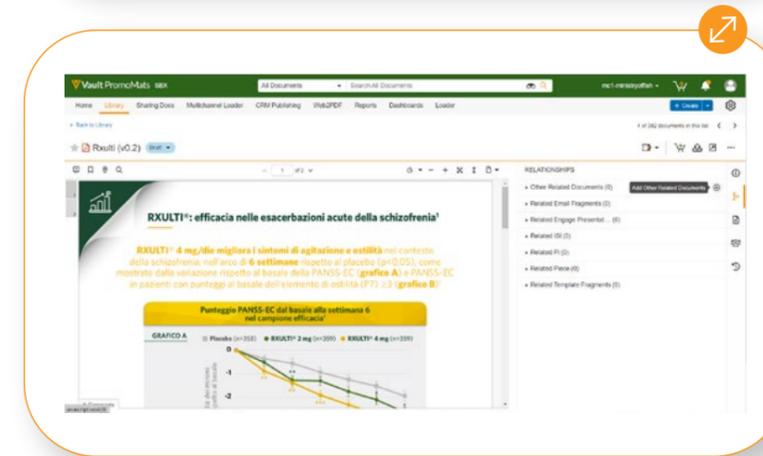
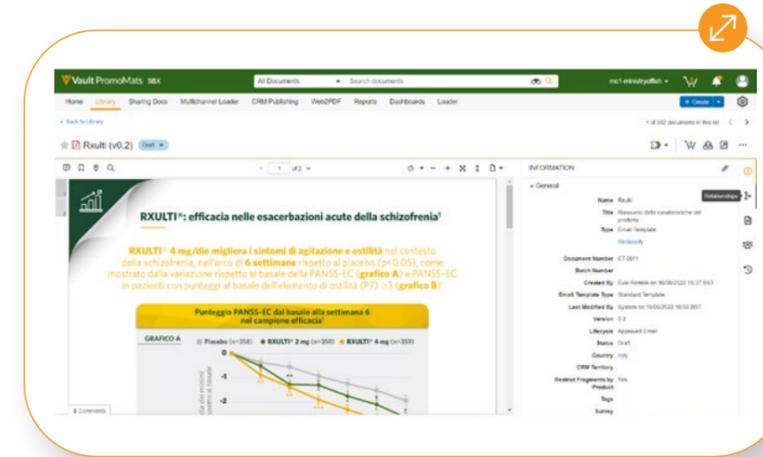
To create links to approved materials within Veeva (that will allow your customers to view and download attachments), you will need to include these within the metadata of the email fragment.

To do so, click on the **'Relationships'** button and then **'Other Related Documents'**.

- The document reference number is the last 4/5 digits after the underscore of the Global ID. For example, if the Global ID number is: 47576_11223 you will need to search for 11223.

Once located, tick the check box before closing. The document will then be attached. Repeat the process to attach additional documents.

Tip: Prescribing information can only be added as a link through 'Related PI' metadata and not through 'Other Related Documents'.





Vault PromoMats SBX

mc1-ministryoffish
🛒
🔔
👤

Home Library Sharing Docs Multichannel Loader CRM Publishing Web2PDF Reports Dashboards Loader
+ Create

« Back to Library
1 of 382 documents in this list

★ Rxulti (v0.2) Draft
📄 🛒 📁 📄 ⋮

1 of 2

🔍

RXULTI®: efficacia nelle esacerbazioni acute della schizofrenia¹

RXULTI® 4 mg/die migliora i sintomi di agitazione e ostilità nel contesto della schizofrenia, nell'arco di **6 settimane** rispetto al placebo (p<0,05), come mostrato dalla variazione rispetto al basale della PANSS-EC (**grafico A**) e PANSS-EC in pazienti con punteggi al basale dell'elemento di ostilità (P7) ≥3 (**grafico B**)¹

Punteggio PANSS-EC dal basale alla settimana 6 nel campione efficacia¹

GRAFICO A
■ Placebo (n=358)
● RXULTI® 2 mg (n=359)
● RXULTI® 4 mg (n=359)

INFORMATION

▼ General

Name Rxulti Relationships

Title Riassunto delle caratteristiche del prodotto 📄

Type Email Template 👤

Reclassify

Document Number ET-0011

Batch Number

Created By Evie Remsik on 16/06/2022 16:37 BST 🕒

Email Template Type Standard Template

Last Modified By System on 16/06/2022 16:56 BST

Version 0.2

Lifecycle Approved Email

Status Draft

Country [Italy](#)

CRM Territory

Restrict Fragments by Product Yes

Tags

Survey

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Vault PromoMats sbx All Documents Search All Documents mrc1-ministryoffish

Home **Library** Sharing Docs Multichannel Loader CRM Publishing Web2PDF Reports Dashboards Loader + Create

Back to library 4 of 382 documents in this list

★ Rxulti (v0.2) Draft

1 of 2

RXULTI®: efficacia nelle esacerbazioni acute della schizofrenia¹

RXULTI® 4 mg/die migliora i sintomi di agitazione e ostilità nel contesto della schizofrenia, nell'arco di 6 settimane rispetto al placebo (p<0,05), come mostrato dalla variazione rispetto al basale della PANSS-EC (grafico A) e PANSS-EC in pazienti con punteggi al basale dell'elemento di ostilità (P7) ≥3 (grafico B)¹

Punteggio PANSS-EC dal basale alla settimana 6 nel campione efficacia¹

GRAFICO A

■ Placebo (n=358) ● RXULTI® 2 mg (n=359) ● RXULTI® 4 mg (n=359)

Relationships: Other Related Documents (0), Related Email Fragments (0), Related Engage Presentat... (0), Related ISI (0), Related PI (0), Related Piece (0), Related Template Fragments (0)



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The screenshot displays the Veeva Vault PromoMats interface. The main document view shows 'Rxulti (v0.2)' in a 'Draft' state. A modal window titled 'Add Other Related Documents' is open, displaying a list of related documents:

Document Name	ID	Category	Status
AM Attachment 1 (v0.1)	PP-CC--0009	Cholecap Promotional Piece	Approved
Abilify Attachment 1 (v0.1)	PP-CC--0008	Cholecap Promotional Piece	Draft
Attachment 1 (v1.0)	EF-0001	Cholecap Email Fragment	Approved



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Step 7 Stage for testing

To preview your email template, click the  icon in the right hand corner and click Generate Email Preview. This will display your email on different devices, operating systems and browsers in Vault.

Move to testing. From here you can send the email from PromoMats to Veeva CRM sandbox – if you are happy and want to perform this action click **‘Yes’**.

The email template will now have moved from **‘draft’** into **‘staged’** and from version 0.1 to version 0.2.

 Tip: Veeva automatically runs a process that syncs newly added emails from PromoMats into the CRM environment. Please note, it can take up to an hour for your materials to be visible in CRM. Once this process has been completed, you will be able to begin testing your emailer.

However, If you need to test your email quickly you can bypass the wait time and force a refresh by navigating to the Veeva process scheduler and selecting the run button on your approved email line.

Step 8 Testing your email

Go to test.salesforce.com and login.

In **‘Customer Record’** you will see the **‘Action Menu(▼)’** located in the top right-hand corner of the screen. Open and select **‘Send Email’**, where you will see a list of emails you have access too, including your email. Select your email and click on the option to **‘Add Selected’**, click on this to view a preview of your email as seen by the HCP.

If the email has been designed with tokens, you will have the option to customise the email before clicking send. A notification on your screen will confirm the email has been sent. You can now go into **‘Sent Emails’** where you can see the email sent date and status.

To check the email has been received and the links are working, please login to the following Gmail account: **otsukatest012020@gmail.com**. Please contact your local CRM admin to obtain the password for this test account.

Note: As you are within the test environment, this will not send a live email to customers. The email will be received by a test address as mentioned above.

 Tip: Please ensure that the HCP test account has approved email consent in the same therapy area as your email’s Veeva product metadata.

This can be changed by navigating to Customer Record and using the Action Menu(▼) located in the top right-hand corner. Within that menu select the Consent Capture page and select the required areas. **Do Not** check the ‘Use email to capture consent’ checkbox.



Uploading email fragments

Email fragments are coded snippets of HTML that may contain:

- Embedded text
- Image(s)
- Links to promotional or reference materials stored in PromoMats
- URLs to external content

Once approved, the same email fragment can be used across multiple email templates.

What you'll receive from the agency

One zip folder containing a HTML file and a folder containing image assets for the email.

Fragment Pros

- Only requires approval once but can be used across multiple emails
- Saves time and development costs in the long term
- Allows users an element of personalisation to their emails by being able to easily share relevant content to customers

Fragment Cons

- Requires initial agency support to build
- Cannot be standalone and must be embedded within an approved email template



Step 1 Ready your files

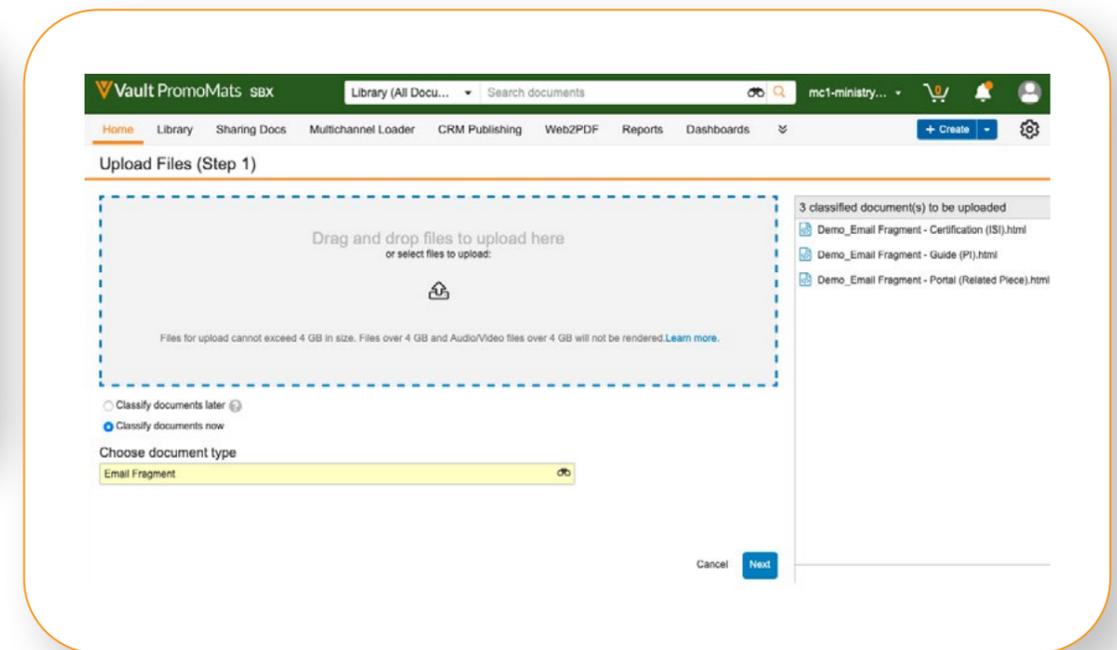
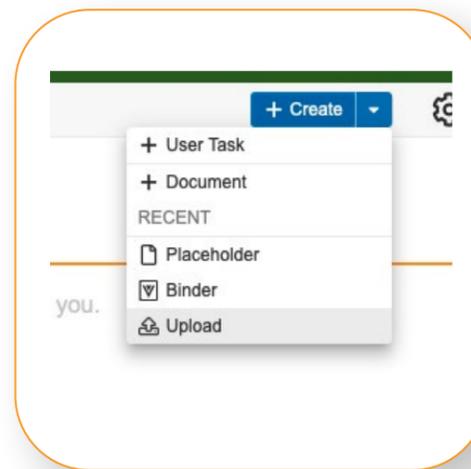
Unzip the file – right click and choose **'Extract All'**. Save this copy where you wish to access it.

The unzipped folder will contain two files: The HTML file, identifiable by the **'.html'** extension, and a second folder titled **'Images'**. Agencies may label these files differently, look for the relevant file name extension and a folder containing the appropriate emailer images.

Step 2 Set up the email fragment and upload your files

In Veeva PromoMats, click on **'Create'** and select **'Upload'**. To choose a document type, search for **'Email Fragment'** in the yellow search bar and drag and drop your **'.html'** file into the allocated space.

 Tip: You can upload multiple email fragments at once – just make sure you complete the below steps for all.



Step 3 Completing the metadata

Fill out the meta data as required.

You will need to complete all the fields that are highlighted yellow in order to save the fragment.

If you need assistance completing Email Fields please use the reference to the right.

Vault PromoMats

Library (All Documents) Search documents

Tasks Library Admin Tools + Create

Upload Files (Step 2)

2 document(s) missing required properties. 0 documents with duplicates were detected.

Select All | Unselect All

Demo_Email Fragment - Cer...html 1KB

Demo_Email Fragment - Gui...html 1KB

Apply Cancel Save

General*

Name*

Description*

Country*

Product*

Version 0.1

Type Email Fragment

Language* English

Tags

CRM Territory

Survey

Lifecycle State Stage ID

Lifecycle Stage

Document Link

Document Version Link

Persona*

Standard Metrics



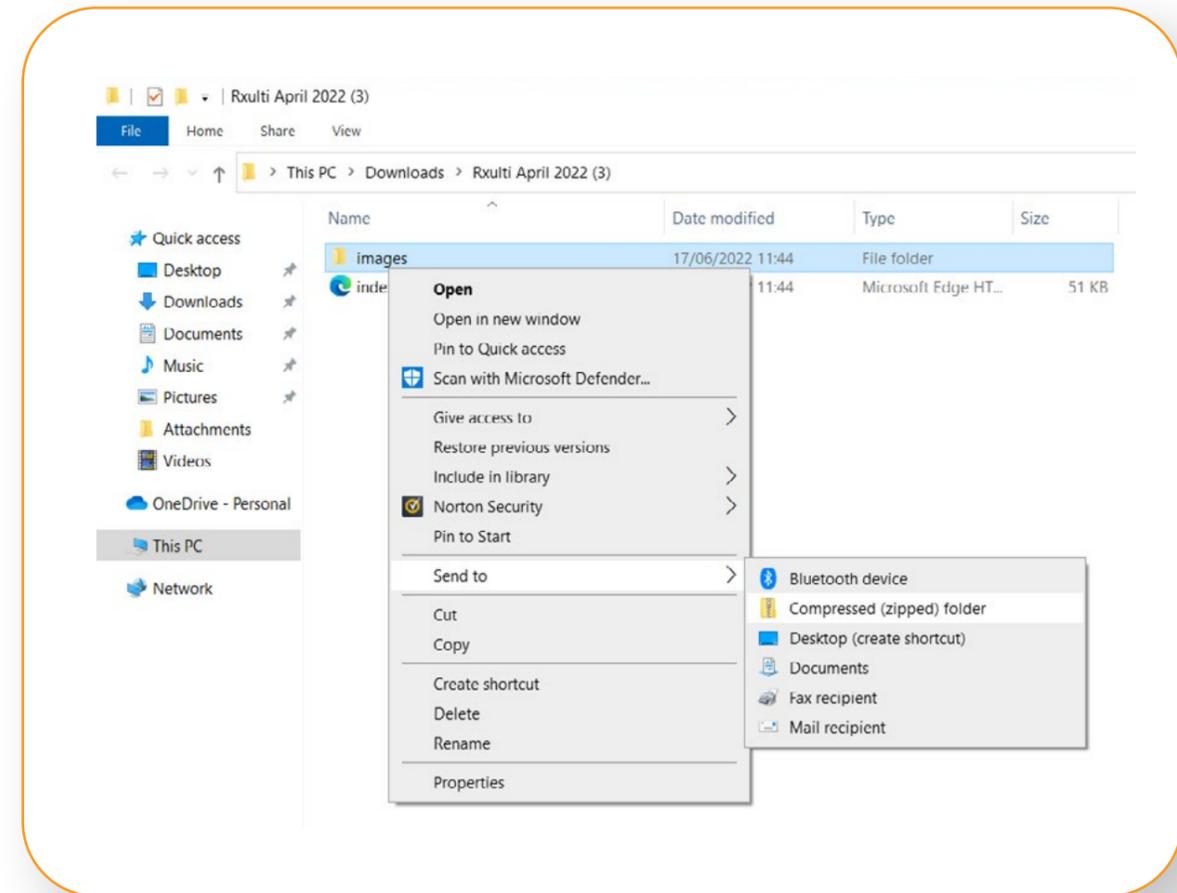
Step 4 Uploading the images and linking documents

Once the HTML has been uploaded, you will need to upload the images and link related documents for the fragment to render and ensure it takes customers to the correct material.

To upload the image folder, it must be zipped. To do this, go to your unzipped image folder and right click. Select **'Send To'** and click on **'Compressed (zipped)'**.

Go back to PromoMats and scroll down the information section on the righthand side to the field labelled **'Assets'**.

Click on the small plus symbol and choose your zipped image file, **'Open'** and **'Upload'**.



Step 4 Uploading the images and linking documents

To create links to approved materials within Veeva (that will allow your customers to view and download attachments), you will need to include these within the metadata of the email fragment.

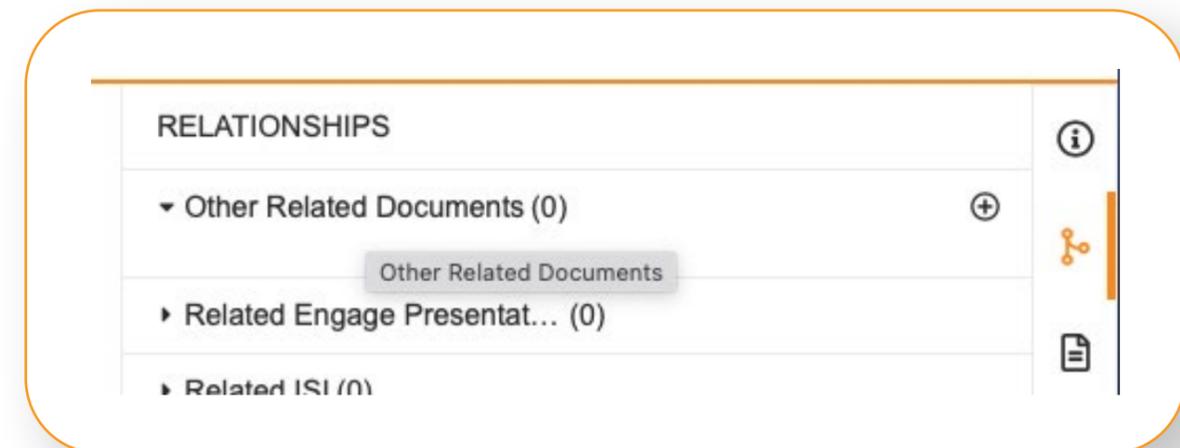
To do so, click on the **'Relationships'** button  and then **'Other Related Documents'**.

Click on the small plus symbol to search for the document reference you want to add.

- The document reference number is the last 4/5 digits after the underscore of the Global ID. For example, if the Global ID number is: 47576_11223 you will need to search for 11223.

Once located, tick the check box before closing. The document will then be attached.

 Tip: Linked documents must be approved before testing. The link token will not work otherwise.



Step 5 **Uploading the images and linking documents**

To move to testing, click the arrow icon on the right-hand corner (➔). Select **'Stage for Testing'** from the dropdown options.

From here you can send the email from PromoMats to Veeva CRM sandbox - if you are happy and want to perform this action click **'Yes'**.

From here you will be able to preview your fragments.



You will only be able to preview your fragments by adding them to an email template that has specifically been built to embed email fragments.



Step 6 Adding email fragments to email template

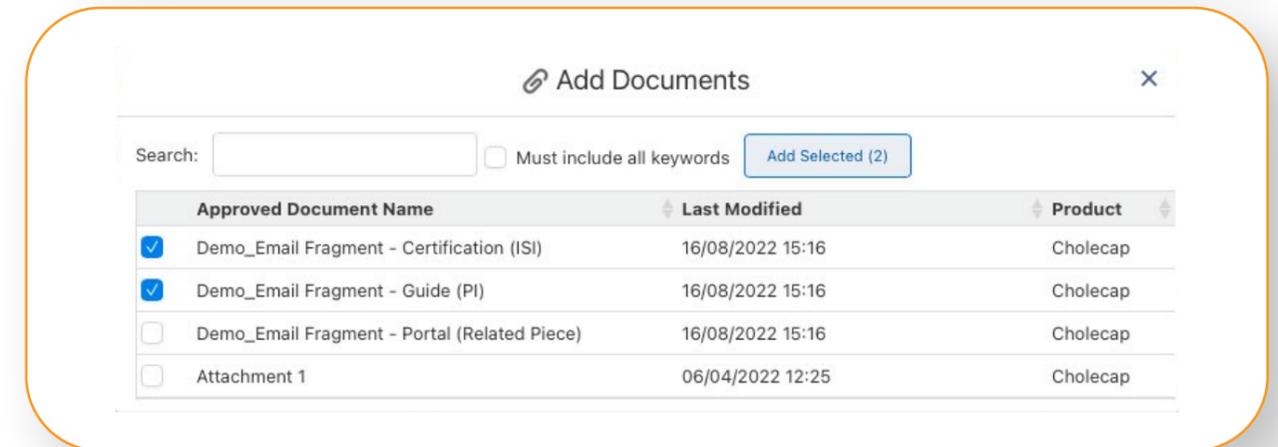
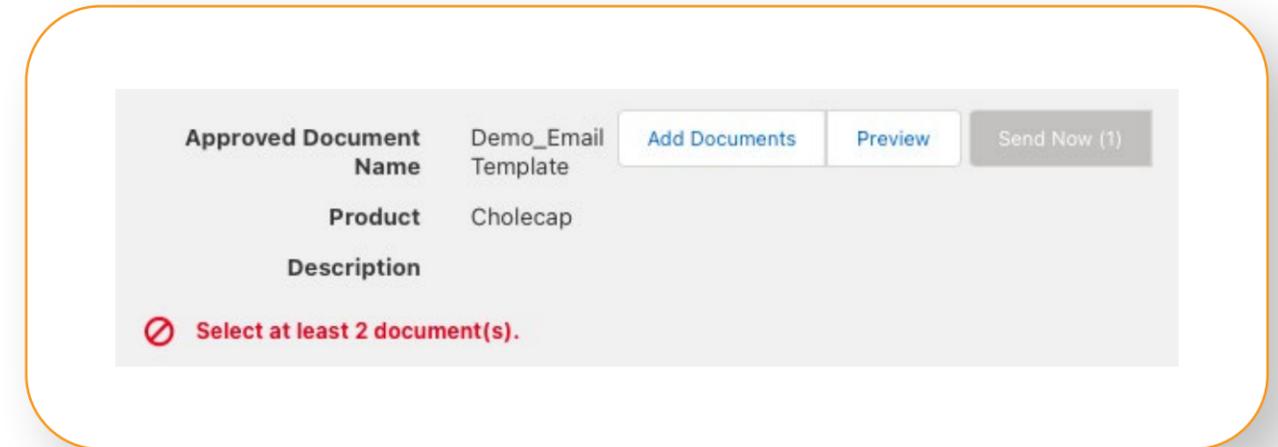
See [Step \(8\)](#) of [How to upload a VAE to Veeva PromoMats](#) for information on previewing and testing your email. You will need to complete this step to be able to carry out the steps below.

Once in the sandbox, with your email template and fragments uploaded, you will be able to preview these together and send a test email.

When previewing your email, **salesforce will notify you that you will need to include a number of documents** (depending on the minimum number that has been set) before you are able to continue.

To do so, click **'Add Documents'**, select the fragments you wish to include and click **'Add Selected'** from the pop-up menu.

 **Tip:** Multiple email fragments must be placed one after the other within the email template. You cannot have an email fragment at the beginning, content within the email template and another fragment below.



How to create a BEE email in Veeva PromoMats

BEE Editor is a drag and drop application that allows you to create your own HTML email template, without the need to code HTML.

 Tip:

- BEE Editor can only create email templates and not email fragments
- Cannot be used on HTML templates created outside of BEE Editor or edited outside of BEE Editor



[HTML vs BEE](#)

[Upload a VAE](#)

[Upload Fragments](#)

[BEE Emails](#)

['Make a Copy' Guidance](#)

[Thumbs Up / Thumbs Down](#)

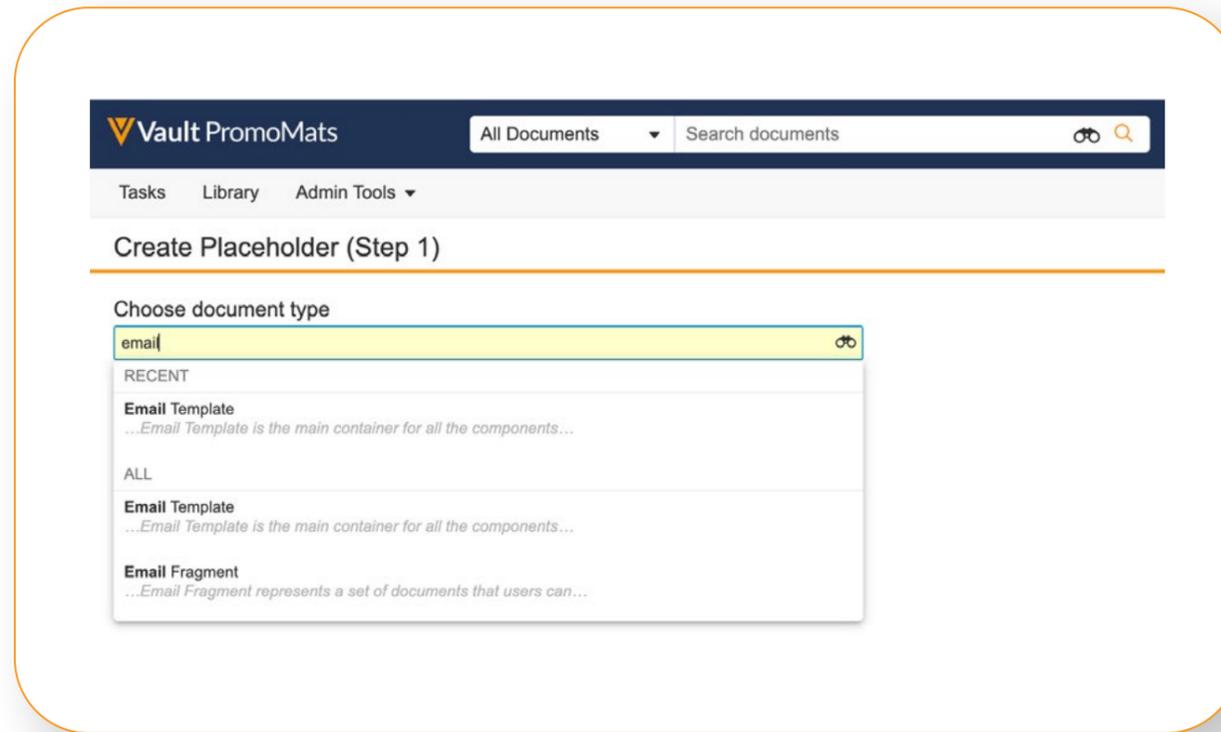
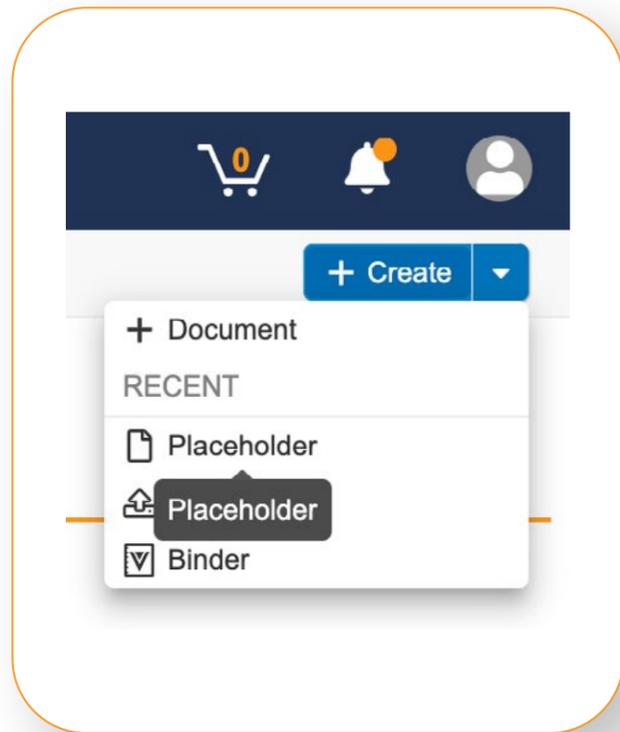
[Consent Emails](#)

[Token Guidance](#)

[Survey Links](#)

Step 1 Creating a Placeholder

In Vault PromoMats click **'Create'** and select **'Placeholder'**. Choose **'Email Template'** as your document type and click **'Next'**.



Step 2 Complete the metadata

Complete the relevant document metadata.
The fields below must be completed, to ensure the application has all the information it needs, to create the email template:

- Name
- Country
- Identify a product
- Select email template type
- Restrict fragments by product - YES
- Email fields - enter tokens as required

Once completed click **'Save'**.

The screenshot shows a web form for creating an email template. At the top right is a '+ Create' button. Below it are 'Cancel' and 'Save' buttons. The form is organized into sections, with the first section being 'General*'. This section contains the following fields:

- Name***: A text input field.
- Description***: A text input field.
- Country***: A dropdown menu with a globe icon.
- Product***: A dropdown menu with a globe icon.
- Version**: A text input field containing '0.1'.
- Type**: A dropdown menu with 'Email Template' selected.
- Language***: A dropdown menu with 'English' selected.
- Tags**: A text input field.
- CRM Territory**: A text input field.
- Email Template Type**: A dropdown menu.
- Restrict Fragments by Product***: Radio buttons for 'Yes' (selected) and 'No'.



Step 3 Adding related documents

Now you can create relationships with other vault documents to pre-associate them with the email template, enabling them to be used as either links or attachments.

To action this, click the **'plus sign symbol'** to search and select the related document you wish to add to your email.

Once you have associated all the relevant documents you can launch BEE.

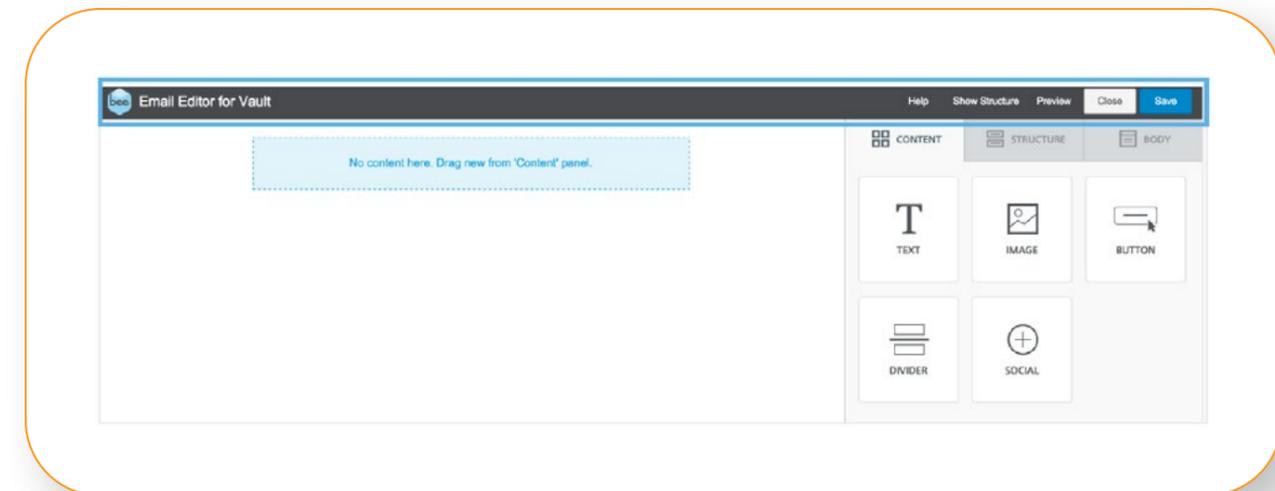
 Tip: Only documents that are **Approved for Distribution** can be selected.

Step 4 Creating your email

Click the **'Action Wheel'** located above the metadata in the top right of the screen and select **'Edit Email'**.

BEE Editor will open in a separate window.

A toolbar of elements, including content, structure and body, will be listed on the right-hand side of the screen. To add elements from the toolbox, drag and drop these into your email.

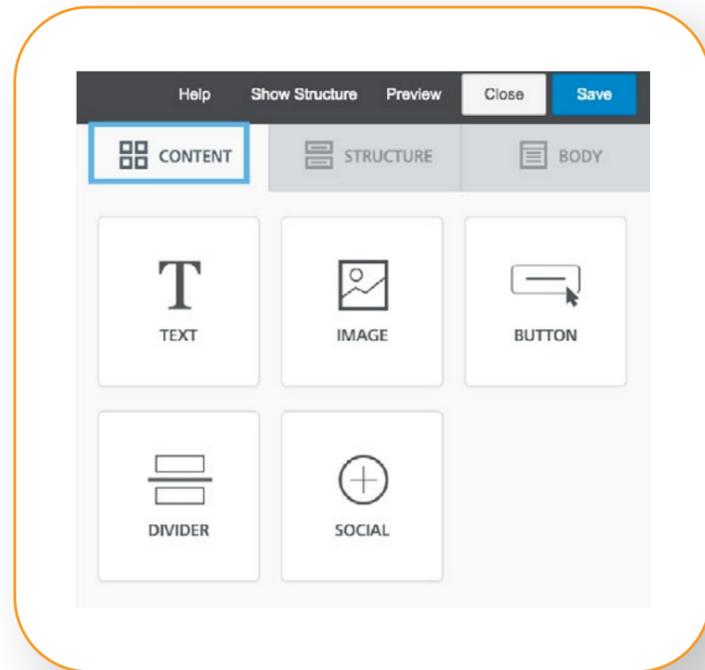


4.1 Content

This section includes a series of tiles which represent the different types of content you can use in your message:

- Text
- Images
- Buttons
- Dividers
- Social

Drag the content you want into the column you want it to sit in and it will automatically adjust to the column width.



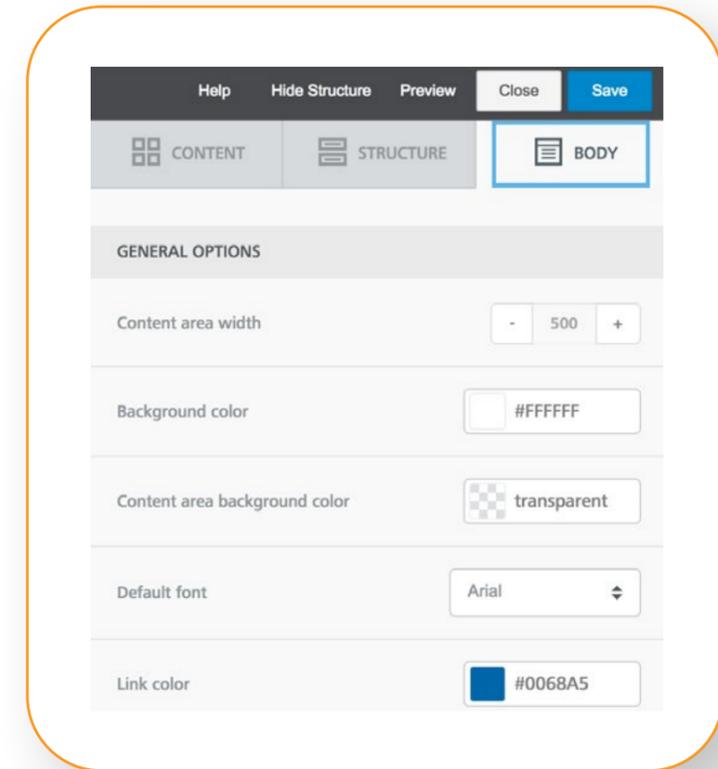
4.2 Structure

This section displays different types of rows to insert into the message - rows are structural units which define the horizontal composition of a section of the message by using columns. You can use from one to four columns. Using more than one column allows you to put different content elements side by side.



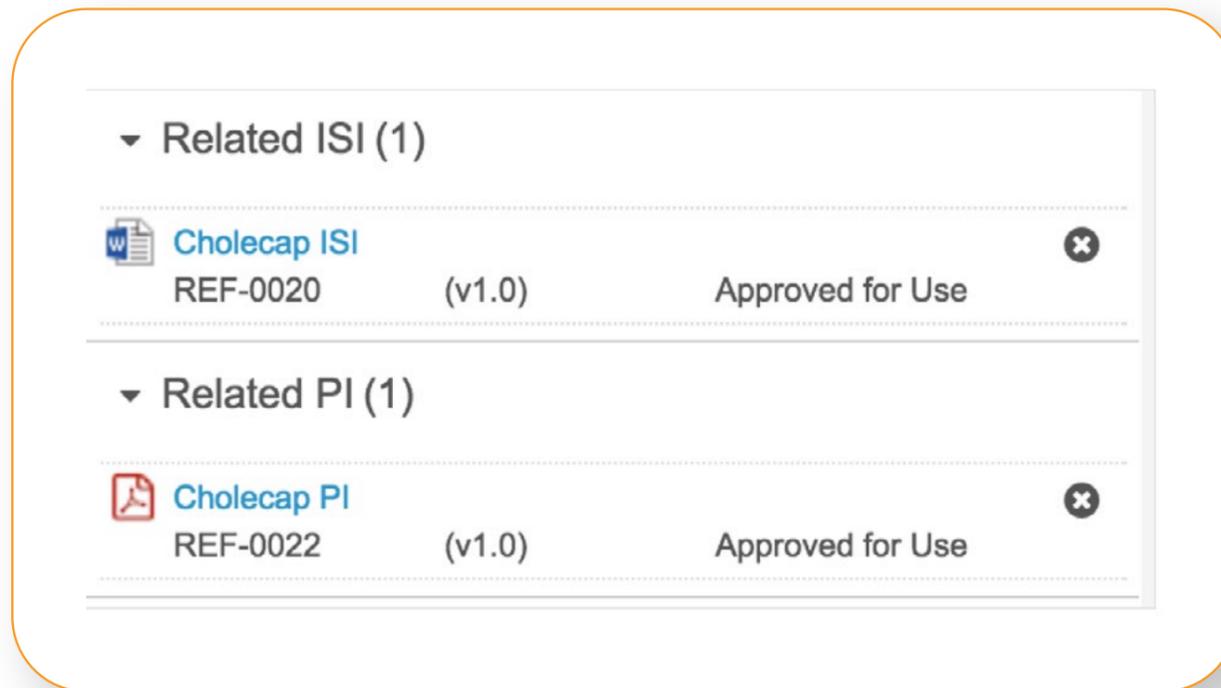
4.3 Body

This section contains the general setting for the message and will affect the styling and look of the content and structure.



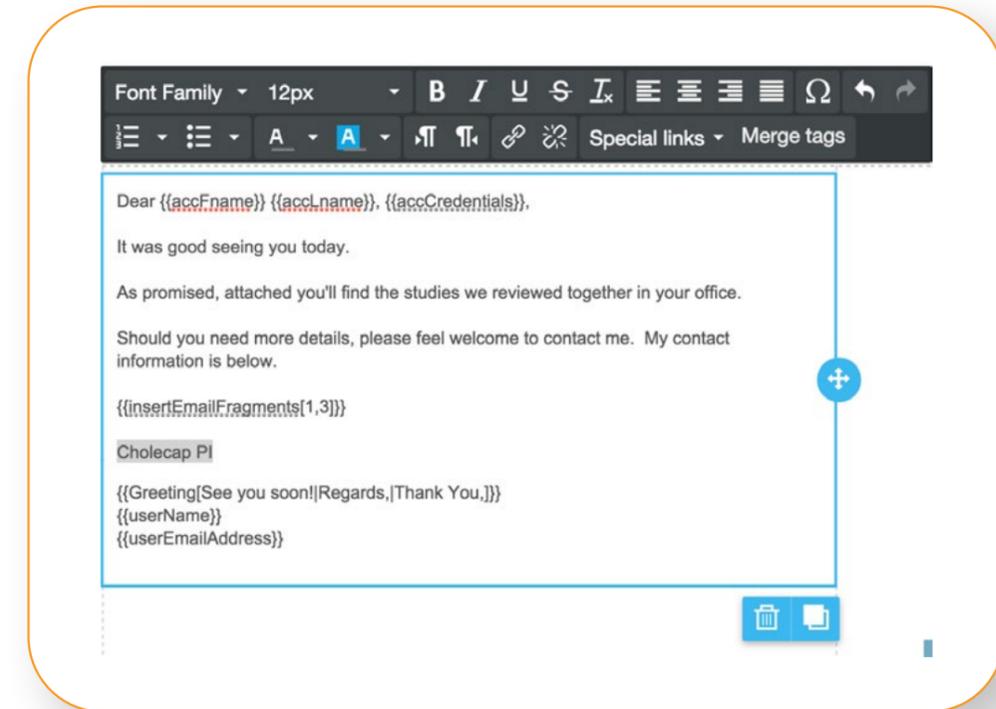
Step 5 Adding a vault document link

BEE Editor gives you the opportunity to add a link to the PI, ISI or other Vault Documents. These documents must first be identified in the email's **'Related Document Properties'** and must be approved - see Step 3



 Tip: From Email Template documents you can preview how the content will render on emails, browsers and devices.

In BEE Editor, type the name of your file as you would like it to be displayed to your recipient and highlight this.



Click on **'Special Links'** located in the bar above the email and select **'Vault Links'**. Now select the document link from the menu. Remember, the document must exist in the relevant **'Related Documents'** section.

“Make a copy”



guidance

How to copy a current BEE email into a new BEE email template.



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Creating a copy of your email

To copy a current BEE email into a new BEE email template, select and open the email you wish to copy.

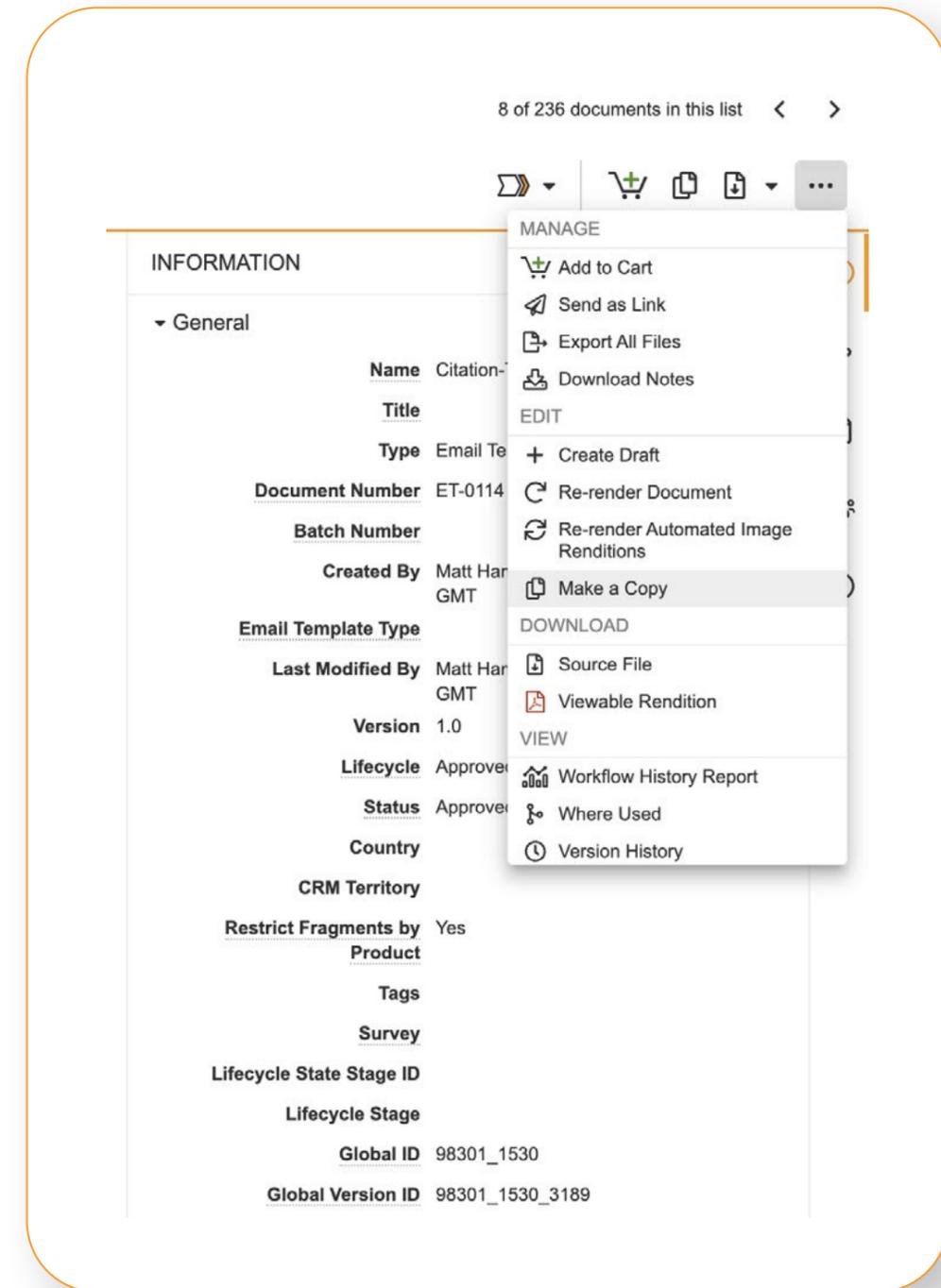
Click on the ellipsis **'All Actions'** icon located in the top right-hand corner of the screen.

There will be an option to **'Make a Copy'**, select this. Rename the email so it is not the same as the original copy. Here you will also have the option to choose:

- Copy Content - Brings forward all the text from the original email into your template
- Copy Fields - Duplicates all the metadata information from the original email to your own
- Copy Attachments - Brings forward all the attachments from the original to yours, meaning those same attachments will be sent out with your email

Select what you wish to copy and click **'Continue'**.

This will open a new copy of your original BEE email, which you can now edit.



Thumbs up / thumbs down

How to add simple feedback buttons to every email.



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Thumbs Down

Consent Emails

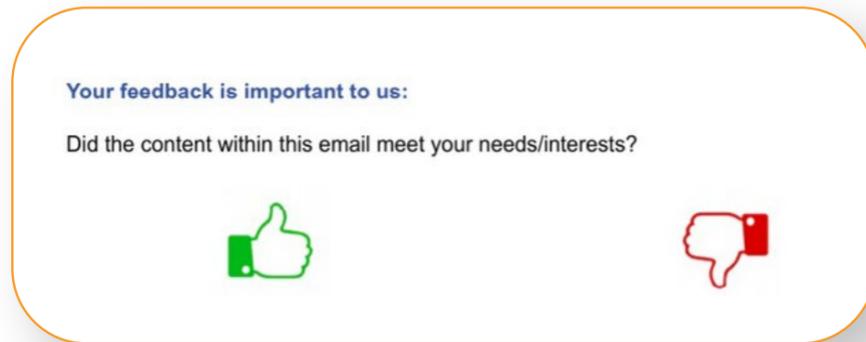
Token Guidance

Survey Links

Thumbs up / thumbs down

The thumbs up / thumbs down tokens should be added to all emails to allow receipt of quick and simple feedback on the content within both VAE and BEE mailers. This feedback helps sales and marketing teams to understand whether the email content has met the interest or needs of HCP recipients.

- Thumbs up 👍 - email recipient can select this button when they find the content effective, relevant, or interesting.
- Thumbs down 👎 - email recipient can select this button when the content feels less useful, not applicable to them or uninteresting.



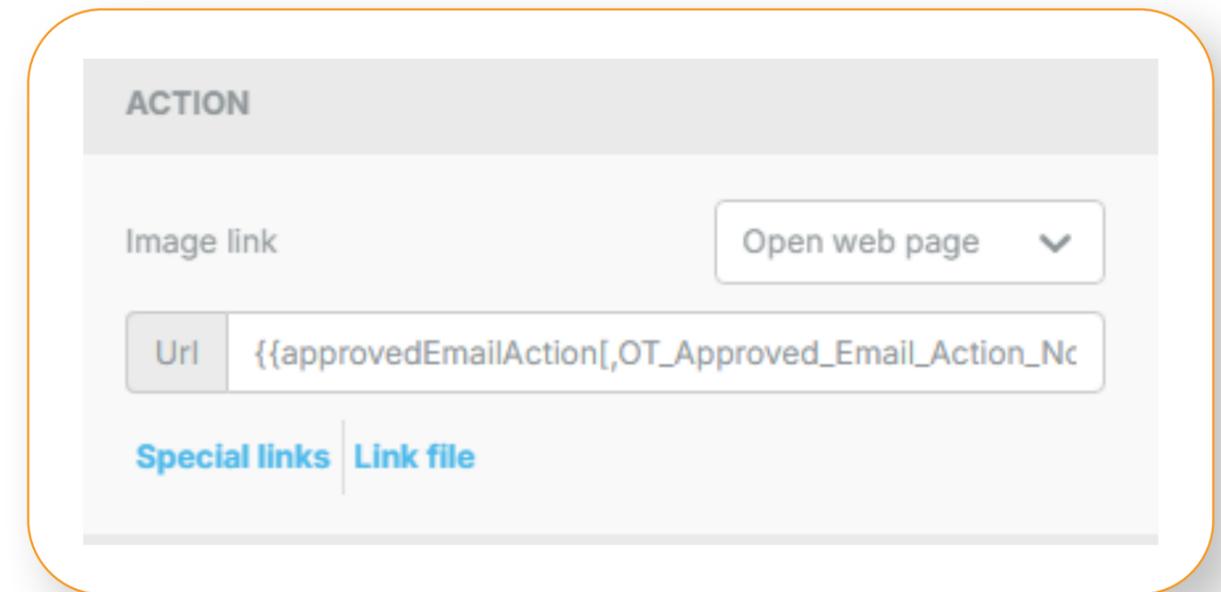
Tokens

Thumbs up 👍:

```
{{approvedEmailAction[,OT_Approved_Email_Action_Yes]}}
```

Thumbs down 👎:

```
{{approvedEmailAction[,OT_Approved_Email_Action_No]}}
```



💡 Tip: For BEE mailers, place the tokens within the url section of the thumbs up / thumbs down images. For HTML mailers, place the tokens within an <a>.

Consent emails

The set up of opt-in emails differs from regular Veeva Approved Emails (VAE's).



HTML vs BEE

Upload a VAE

Upload Fragments

BEE Emails

'Make a Copy' Guidance

Thumbs Up / Thumbs Down

Consent Emails

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Consent emails - Metadata

As previously mentioned Opt-in emails have slightly different requirements. Namely the Email Templates metadata - for which we have highlighted the differences opposite.

Consent emails - Multichannel Routing records

Multichannel Routing records determine which email template is used for capturing consent for Approved Email and Remote Meeting invitations.

When creating a new Opt-in email please reach out to your Veeva admins in order to set up a new Multichannel Routing record, citing the Document number.

▼ General

Name ES Veeva Double Opt-In Approved Email Receipt v3

Document Number ET-0097

Description Spanish language version of Veeva Double Opt-In Approved Email Receipt

Country Global

Product Email Receipt

Version 2.0

Status Approved

Type Email Template

[Reclassify](#)

Lifecycle Approved Email

Language Spanish

Tags

Created By Paul Allen on 23/11/2020 14:45 GMT

Last Modified By Paul Allen on 23/04/2021 10:24 GMT

Copy Depth 2

CRM Territory

Email Template Type Receipt Template

Restrict Fragments by Product Yes

Survey

Content Type

Consent Check No

Lifecycle State Stage ID STATESTAGE-000043

Lifecycle Stage Approved for Use

Global ID 47576_23842

Global Version ID 47576_23842_41698

Document Link

Document Version Link

Persona Market Access, MSL, Sales Rep



Token guidance

How to incorporate tokens into a Veeva
Approved Email (VAE).



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What are email tokens?

Email tokens are used for personalisation by the email creator and for limited personalisation by Sales Reps. These are placed within the text of an email and rendered in Salesforce. Some examples can be found below.

Token	Use
{{accTitle}}	Mr, Mrs, Mx, Dr
{{accFname}}	The first name of the person you are sending it to
{{accLname}}	The last name of the person you are sending it to
{{userEmailAddress}}	The sales rep's email
{{approvedEmailAction[,OT_Approved_Email_Action_Yes]}}	Thumbs up 👍

Token	Use
{{userName}}	The sales rep's name
{{\${00000}}}	Link external doc; you need the last 5 numbers of a global doc ID
{{approvedEmailAction[,IT_Confirm_Opt_In]}}	Consent capture on opt in emails; see VAE guide for more
{{unsubscribe_product_link[,Unsubscribe_GB]}}	(Dictated by two letters at the end for country)
{{approvedEmailAction[,OT_Approved_Email_Action_No]}}	Thumbs down 👎



Survey links in email templates

Marketing & portfolio management.



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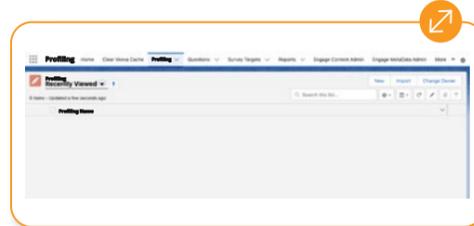
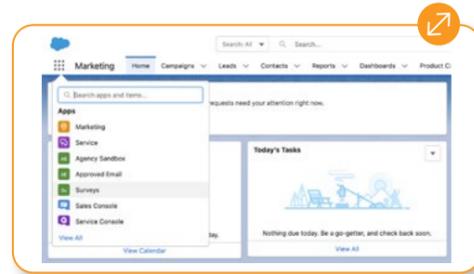
Token Guidance

Survey Links

Create a Survey/Profile

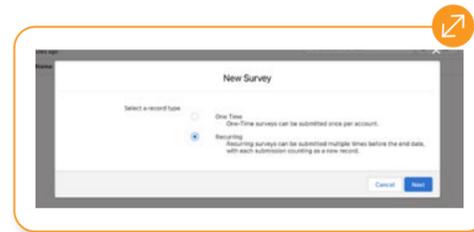
Step 1 Create a profile

Sign into Salesforce and navigate to **'Profiling'** via the top left menu icon. Then click on the **'Profiling'** tab in the top bar, followed by the **'New'** button.



Step 2 Select a record type

Click on **'Recurring'** (this allows you to use the Profiling more than once) and click **'Next'**.



Step 3 Edit profiling

The 'Profiling Edit' will appear next - fill out the information accordingly, being sure that the external ID you've selected is unique and case sensitive. Click **'Save'** once finished.



Step 4 Add your survey questions

Within the final screen you can add your survey questions to complete the process. This is also the screen you would reach if you are editing an existing profile and wishing to make changes to the questions.





The screenshot shows the Veeva VAE Marketing Home dashboard. At the top left is the Veeva logo. To its right is a search bar with a dropdown menu set to "Search: All" and a search input field containing "Search...". Below the logo is a navigation bar with a grid icon followed by "Marketing", "Home", "Campaigns", "Leads", "Contacts", "Reports", "Dashboards", and "Product Ca". The "Home" tab is selected. A search bar with the placeholder "Search apps and items..." is open, displaying a list of apps: Marketing, Service, Agency Sandbox, Approved Email, Profiling (highlighted), Sales Console, and Service Console. A "View All" link is at the bottom of the list. Below the app list is a "View Calendar" link. The main content area features a notification: "requests need your attention right now." Below this is a "Today's Tasks" section with a calendar icon and the text "Nothing due today. Be a go-getter, and check back soon." and a "View All" link.





The screenshot displays the Veeva VAE Profiling interface. At the top, there is a navigation bar with the following items: Home, Clear Veeva Cache, Profiling (selected), Questions, Survey Targets, Reports, Engage Content Admin, Engage MetaData Admin, and More. Below the navigation bar, the main content area is titled 'Profiling Recently Viewed' and shows '0 items • Updated a few seconds ago'. The interface includes a search bar labeled 'Search this list...' and several action buttons: New, Import, and Change Owner. A table header is visible with a checkbox and the text 'Profiling Name'. The table body is currently empty.



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utes ago

Name

Profiling

Select a record type

One Time
One-Time surveys can be submitted once per account.

Recurring
Recurring surveys can be submitted multiple times before the end date, with each submission counting as a new record.

Cancel Next





Profiling Edit

[Save](#) [Cancel](#)

Information

Profiling Name **Status** Development

Record Type Recurring **Channels**
 CLM
 CRM

Start Date **Owner** [Content Loader](#)

End Date **External ID**

Assignment Rules

Assignment Type **Allow users to choose targets?**

Product **Included user territories:**

[Save](#) [Cancel](#)





Profiling Detail

[Edit](#) [Delete](#) [Clone](#) [Translate](#) [Publish](#)

▼ Information

Profiling Name	Training Survey	Status	Development
Record Type	Recurring	Channels	CLM, CRM
Start Date	30/06/2023	Owner	Content Loader
End Date	30/06/2025	External ID	SurveyID-1

▼ Assignment Rules

Assignment Type	Product and Territory	Allow users to choose targets?	<input type="checkbox"/>
Product	Cholecap	Included user territories:	101

System Information

Created By	Content Loader , 30/06/2023 12:08	Last Modified By	Content Loader , 30/06/2023 12:11
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Profiling Questions (0/25)

▼ Survey Questions (0/25)

[New Survey Question](#) [Question Bank](#)



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'Make a Copy' Guidance

Thumbs Up / Thumbs Down

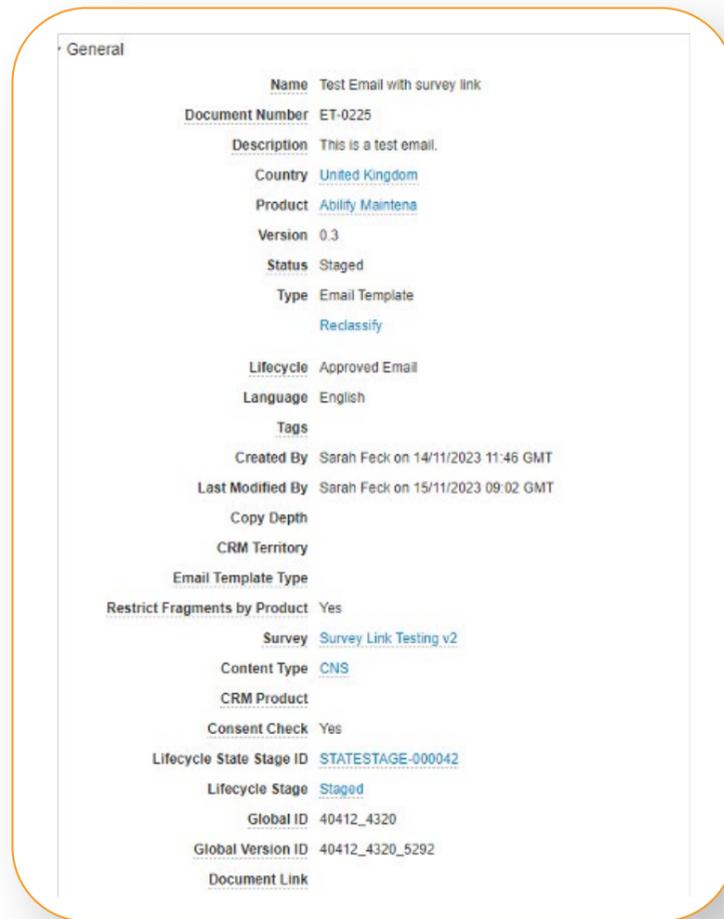
Consent Emails

Token Guidance

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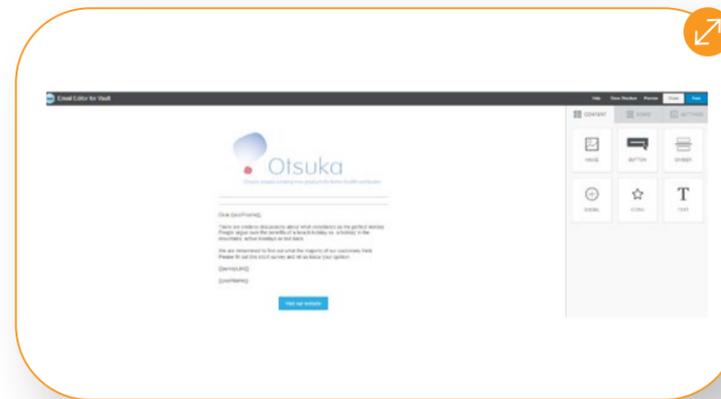
Step 5 Create a placeholder in PromoMats and fill the metadata

- Create a placeholder for your email in Veeva PromoMats.
- Fill in all the necessary metadata
- In “Survey” select the survey that was created in Step 1



Step 6 Create the email template

- You can either create the email template yourself (for example with Bee Editor) or ask an agency to help you with the creation.
- Don't forget to include the survey token in the email template
- Once complete, save your email and stage the email for testing



Step 7 Testing the email template and link

- Once the email has been staged for testing, it will be synchronised to Veeva CRM. This is not an instant process. The auto-sync runs once every hour. If you need the template to be synchronised sooner, please reach out to the Veeva CRM system admin (Debbie Young, Sarah Feck)
- Select an HCP with consent to the therapeutic area and consent type the email template was created for and click on “Send Email”





The screenshot displays the 'Email Editor for Vault' interface. The main workspace shows an email draft for 'Otsuka' with the tagline 'Otsuka-people creating new products for better health worldwide'. The email content includes a personalized greeting 'Dear {{acrFname}}', a paragraph about holiday preferences, a survey request, a survey link placeholder '[[surveyLink]]', a user name placeholder '[[userName]]', and a 'Visit our website' button. On the right, a sidebar menu contains options for 'CONTENT', 'ROWS', and 'SETTINGS'. Under 'CONTENT', there are icons for 'IMAGE', 'BUTTON', 'DIVIDER', 'SOCIAL', 'ICONS', and 'TEXT'. The top of the editor has a menu with 'Help', 'Show Structure', 'Preview', 'Close', and 'Save'.



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Approved Document Name Test Email with survey link Preview Send Now (1)

Product Abilify Maintena GB

Content Type CNS

Description This is a test email.

ALERT: All outbound emails will be sent to (otsukatest012020@gmail.com), and will not be sent to the Account email addresses.
[Change Test Email Address](#)

To Khan, Sylvia <otsukatest012020@gmail.com>

Subject Opinions on holiday destinations



Otsuka
Otsuka-people creating new products for better health worldwide

Dear Sylvia,

There are endless discussions about what constitutes as the perfect holiday. People argue over the benefits of a beach holiday vs. a holiday in the mountains; active holidays or laid back.

We are determined to find out what the majority of our customers think. Please fill out this short survey and let us know your opinion.

AELink* docId="a22Ad00000045dpiAA" linkType="surveyLink

Steve Finnigan



Step 8 Open the test email and verify the survey is working

- Log on to otsukatest012020@gmail.com and open the test email.
- Click on the survey link and fill in the survey

Survey Link Testing v2

* INDICATES A REQUIRED FIELD

1. What's your preferred holiday surroundings?

2. Do you prefer hot or cold weather?

-None-
 Hot
 Cold

Submit

Step 9 Analytics

- Survey entries are stored in the Veeva CRM system against the HCP who entered them.
- Your local CRM admin can support you in creating a report on all entries

Profiling Questions

Questions	Answers	% Frequency
1. What's your preferred holiday surroundings?	Beach	50.00%
	Mountains	50.00%
	City Breaks	0.00%
	I prefer to stay at home	0.00%
2. Do you prefer hot or cold weather?	Hot	50.00%
	Cold	50.00%

Segment (0/10)

Segments	Min Score (0)	Max Score (0)	% Frequency
New Profiling Target (Delete Selected (0))			

Profiling Targets

Account	Specialty	Owner	Status	Last Modified Date	Segment
Khan, Sylvia	Elderly Psychiatry	Integration User	Submitted	15/11/2023 10:45	
Khan, Sylvia	Elderly Psychiatry	Integration User	Submitted	15/11/2023 10:45	





Survey Link Testing v2 Submit

* INDICATES A REQUIRED FIELD

1. What's your preferred holiday surroundings?

2. Do you prefer hot or cold weather?

--None--

Hot

Cold

Submit





▼ **Profiling Questions**

Questions	Answers										
1. What's your preferred holiday surroundings?	<table border="1"> <thead> <tr> <th>Answers</th> <th>% Frequency</th> </tr> </thead> <tbody> <tr> <td>Beach</td> <td>50.00%</td> </tr> <tr> <td>Mountains</td> <td>50.00%</td> </tr> <tr> <td>City Breaks</td> <td>0.00%</td> </tr> <tr> <td>I prefer to stay at home</td> <td>0.00%</td> </tr> </tbody> </table>	Answers	% Frequency	Beach	50.00%	Mountains	50.00%	City Breaks	0.00%	I prefer to stay at home	0.00%
Answers	% Frequency										
Beach	50.00%										
Mountains	50.00%										
City Breaks	0.00%										
I prefer to stay at home	0.00%										
2. Do you prefer hot or cold weather?	<table border="1"> <thead> <tr> <th>Answers</th> <th>% Frequency</th> </tr> </thead> <tbody> <tr> <td>Hot</td> <td>50.00%</td> </tr> <tr> <td>Cold</td> <td>50.00%</td> </tr> </tbody> </table>	Answers	% Frequency	Hot	50.00%	Cold	50.00%				
Answers	% Frequency										
Hot	50.00%										
Cold	50.00%										

▼ **Segment (0/10)**

Segments	Min Score (0)	Max Score (0)	% Frequency

▼ **Profiling Targets**

[New Profiling Target](#) [Delete Selected \(0\)](#)

<input type="checkbox"/>	Account	Specialty *	Owner	Status	Last Modified Date	Segment
<input type="checkbox"/>	Khan, Sylvia	Elderly Psychiatry	Integration User	Submitted	15/11/2023 10:45	
<input type="checkbox"/>	Khan, Sylvia	Elderly Psychiatry	Integration User	Submitted	15/11/2023 10:45	

